

Compucorp[®]

System Guide 11:
Records Processing

Overview

Storing, locating, and using information are among the most common tasks performed in any office. These information processing tasks typically take up a large part of an office worker's day, and often involve a relatively small amount of frequently-used information.

In this system guide you will learn how to use OMEGA to reduce the amount of time you spend processing frequently-used information in your office. In Section 1 you will learn how to organize information into lists. Once the information has been organized, it can be used in many ways. Sections 2 through 5 explain many of these applications. You will learn how to use a list to address envelopes or labels and how to combine information from a list with a standardized letter or report. You also will learn how to pick out specific kinds of information from a list and how to rearrange a list for specialized applications in Sections 6 and 7.

Sections

1. Creating a Records List
2. Printing a Records List
3. Automatic Letter Writing
4. Envelopes and Address Labels
5. Report Generation
6. Selecting Records
7. Sorting Records

Turn to the next page to begin Section 1.

Applications for information contained in lists

Your office probably has a number of file cabinets filled with information. Some of it might relate to people, such as employees or customers. Some might relate to things, such as products, parts, and suppliers. You probably search through the files frequently to find the information necessary to type on an envelope, to type a label, or to include in a report, letter, or other document.

With OMEGA you will perform these same operations, but you will be able to do them more quickly and efficiently. OMEGA lets you save information on disks in electronic files called "records lists." You can easily incorporate these lists into many different applications, as shown at the right.

Sample Applications

Records List

Ms. Betty Jones
823 W. Zenith Place
San Marino, California 91555
Mr. Martin Lewis
Datamate, Inc.
444 E. Torrey Ave.
Culver City, California 90235
Mr. Connie Morgan
7460 Jimson St.
Santa Monica, California 90605
Mr. Robert Smith
General Services, Inc.
114 W. Alhambra St.
Culver City, California 90230
Mr. Holly Stevens
6210 Salem Ave.
San Marino, California 91555
Mr. Steven
19
38
62

Letters

May 15, 1982

Ms. Betty Jones
823 W. Zenith Place
San Marino, California 91555

Dear Ms. Jones:

Your name has been added to our mailing list. We are sorry that we cannot provide you with more information at this time. We will be glad to provide you with more information when we have the opportunity to do so. We will be glad to provide you with more information when we have the opportunity to do so.

Sincerely,
Robert Smith
Program Director

Labels

Ms. Betty Jones
823 W. Zenith Place
San Marino, California 91555

Mr. Martin Lewis
Datamate, Inc.
444 E. Torrey Ave.
Culver City, California 90235

Ms. Connie Morgan
7460 Jimson St.
Santa Monica, California 90605

Envelopes

Mr. Martin Lewis
Datamate, Inc.
444 E. Torrey Ave.
Culver City, California 90235

Ms. Morgan
7460 Jimson St.
Santa Monica, California 90605

Ms. Betty Jones
823 W. Zenith Place
San Marino, California 91555

Reports

NAME			
NAME	ADDRESS	CITY	STATE
Ms. Betty Jones	823 W. Zenith Place	San Marino	CA
Mr. Martin Lewis	444 E. Torrey Ave.	Culver City	CA
Mr. Connie Morgan	7460 Jimson St.	Santa Monica	CA
Mr. Robert Smith	114 W. Alhambra St.	Culver City	CA
Mr. Holly Stevens	6210 Salem Ave.	San Marino	CA
Mr. Steven	19		
	38		
	62		

Organizing information into a records list

A records list is a collection of related information about a group of people or things. A typical office might have a number of records lists. One might contain customer information, for example, another, employee information, and a third, product information. Each list can be broken down into smaller groups of specific information.

What a records list contains

A records list contains similar information about each person or thing and the information is always saved in the same order. The list in the illustration contains the same kind of information about each of the subscribers to a magazine. Here, the name is always followed by the street address, the city, the state, and the zipcode.

How information in a records list is organized

A records list is made up of "records." Each record is divided into "fields."

- **A record:** A record contains all the information relating to one individual person or thing. In a records list, a page break separates one record from another. In the records list illustrated at the right, a record consists of the name and complete address of each magazine subscriber.
- **A field:** A field is a specific item of information within a record. A field can consist of a single word or a group of words, and a record can contain several fields. Fields in a record are separated from each other by field markers. These markers display as the Greek letter epsilon (ϵ). In the illustration, each record has five fields—company name, street address, city, state, and zip code.

Records List on Screen

```
PAGE 1 LINE 1 CHAR 1
R. J. Howard & Sons, Inc.
1198 Stone Drive
Norfolk
VA
23510

National Systems, Inc.
445 E. 24th St.
Kansas City
MO
64141

Southfield Bank
355 Center Street
Norfolk
VA
23510
```

One Record

```
National Systems, Inc.
445 E. 24th St.
Kansas City
MO
64141
```

One Field

```
National Systems, Inc.
```


Records list overview

Creating a records list involves three main steps. You first decide what kinds of information each record will include. Next, you build your records list. The third step is maintaining your records list to keep it up to date.

1. **Designing the record:** The first step in creating a records list is to decide the amount and type of information to store in each record. These decisions depend on how you plan to use the list both now and in the future. When you have decided what to include, you make a sketch of the record. This will help you later to name and number each field.
2. **Building the records list:** In the second step, you type your list according to the sketch you have made. When you build the list, each record and each field within the record are identified.
3. **Updating the records list:** To keep a records list up to date, new records must be added and old ones deleted or revised.

Step 1: Designing the Record

Company name _____
Street _____
City _____ State _____ Zip _____
No. of issues _____ start date _____
Amt due _____ paid? _____

Step 2: Building the Records List

```

PAGE      3   LINE      5 CHAR    10
L-----V-----P-----T-----M-----R-----
¢Southwestern Industries¢
¢489 S. 5th Street¢
¢Albuquerque, ¢NM¢ ¢87103¢
¢24¢ ¢1/8¢
¢40¢ ¢n¢
V-----
¢Eastern Business Form¢
¢23 King Drive¢
¢Los Gatos¢ ¢CA¢ ¢95030¢
¢12¢ ¢1/8¢
¢17.95¢ ¢y¢
V-----
¢Klien Corporation¢
¢3600 J Street¢
¢Sacramento¢ ¢CA¢ ¢98519¢
¢12¢ ¢7/8¢
¢20¢ ¢n¢

```

Step 3: Updating the Records List

PAGE 4 LINE 1 CHAR 1

Los Gatos, CA 95030,
12 1/82,
17.95 y

Klien Corporation,
3600 J Street,
Sacramento, CA 98519,
12 7/81,
28 n

Johnson Electronics,
Gateway Memorial Drive,
Pittsburgh, PA 15222,
12 1/82,
17.95 y

New Record Added

Step 1. Designing the record

To build a records list, you first decide what information each record will contain and how that information will be organized into fields. These decisions depend on how the list will be used.

When you create the list, you might have only one use for it. In time, however, you may think of many new applications for the information in the list. Using the information in new ways is easy if you build the list to be flexible.

The way to build flexibility into a records list is to plan ahead. The planning should focus on the uses your company might have for the records list in the future. Depending on your office, the responsibility for this planning may be yours, your supervisor's, or may be shared by both of you.

Using a records list

One records list can be used for many applications. The records list in the illustration contains information about magazine subscribers. It can be used to produce labels for mailing the magazine and to create invoices, renewal notices, and late payment reminders.

The way you organize the record information into fields determines how flexible your records list will be. Some applications for a records list may require all of the information stored in a record. Others may require only part of the information.

Using a Records List

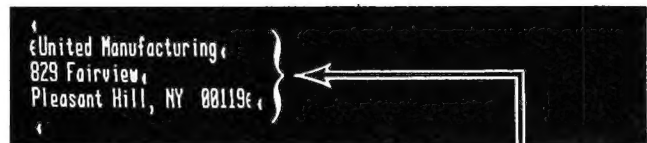
Records List	Applications
Subscriber list	<ul style="list-style-type: none">• Mailing labels• Invoices• Subscription renewal notices• Late payment reminders

Building flexibility into the list

The amount of information you include in each field determines how flexible your records list will be. A field is the smallest usable unit of information within a record. It cannot be divided. If you want to use the information in a field, you must use the whole field, not just part of it.

- **Creating large fields:** The more information you put in a field, the more you limit its use. For example, if you wanted to use the subscriber information field shown in the first illustration, you would have to use all of the information in each record. You would be unable to use just the subscriber's name or just the address.
- **Creating small fields:** By limiting the size of the fields, you make the list more flexible. In the second illustration, each piece of information about a subscriber is placed in a separate field. As a result, each of these items of information can be used individually. For example, you can instruct OMEGA to use only the subscriber's name or only the zipcode in a document. The same is true for each of the other fields in the record.

Sample Large Field



A diagram showing a single field containing the following text:

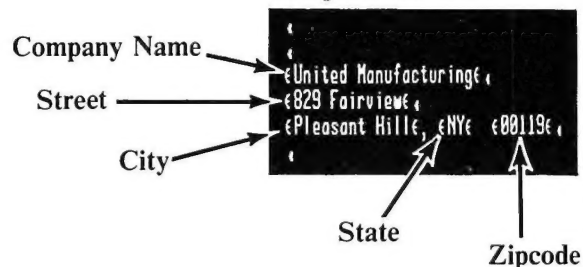
€United Manufacturing€

€829 Fairview€

€Pleasant Hill, NY 00119€
 A large bracket on the right side of the field points to the label "Company Information" below it.

Company Information

Sample Small Fields



A diagram showing a record with the following text:

€United Manufacturing€

€829 Fairview€

€Pleasant Hill€ €NY€ €00119€
 Arrows point from labels to specific fields:

"Company Name" points to "€United Manufacturing€"

"Street" points to "€829 Fairview€"

"City" points to "€Pleasant Hill€"

"State" points to "€NY€"

"Zipcode" points to "€00119€"

Sequencing information in the list

When you have determined what information each record and field will contain, your next step is to sequence the information. You decide which field will come first, second, third, and so on in the record. This order must be the same for each record in the records list.

An easy way to organize the information in the record is to make a sketch of the record. Making a sketch like those illustrated at the right can help you remember the order in which items must be entered. A sketch can also assist you in the following ways.

- **Include all necessary information:** You can see what information you already have in your record and what additional information might be needed.
- **Number the fields:** You can assign numbers to each field and later use these numbers to recall the fields. In the second sample sketch, field 1 consists of the company name only.
- **Describe the fields:** You can designate what type of information will go into each field. In the second sketch, for example, the company name and the street, city, state, and zipcode are all separate fields.

Sample Sketch 1

Field #	Field Description
1	(company info)

Sample Sketch 2

Field#	Fielddescription
1	company name _____
2	street _____
3	city _____
4	state _____
5	zipcode _____

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Step 2. Building the records list

When you have designed the record, you are ready to build your records list. Because it may be difficult to remember the order in which information should be typed, a “mask” can be used to help you build your list with speed and accuracy. The mask contains the same information as your sketch, but it is created and displayed on the screen. Using a mask helps you type your list easily. The mask keeps track of the field numbers and the type of information that should be typed in each field. All you have to do is type.

How a mask assists in building a records list

A mask is not required to create a records list. However, it is recommended because it makes typing a records list much easier. Without a mask, you must refer to the sketch you made each time you add a record to the list. Otherwise, you might not remember what information to type or in what order to type. You must also enter each field marker manually.

When you create a mask, OMEGA displays prompts that tell you what kind of information to type in each field. Since the mask is saved as a document, you can use it over and over to type all records in the list. You can also use the mask whenever you add new records to the list.

How to make a mask

When you make a mask, you define the fields you will use in your list and create prompts to guide you through the typing of the list. When you have done this for all fields, you define the end of the record.

1. **Define the beginning of each field:** With a clear screen displayed, press COMMAND and type MF (Make Field). A field marker displays on the screen. This marks the beginning of the field.
2. **Type a reminder prompt:** When you press (CTRL) MERGE, OMEGA displays the message, "Type a message for the typist." When you see this message, type a description of the kind of information you will enter in this field. When you type your records list, this prompt displays to remind you of what to type in this field for each record. In the first illustration, the name will be entered in field 1.

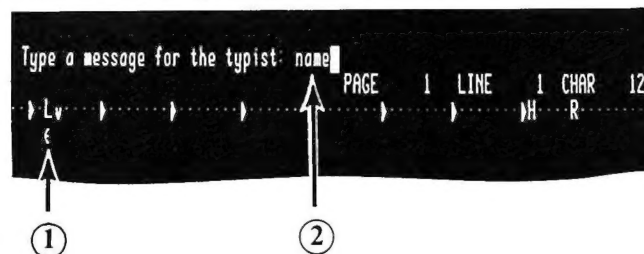
After you type the prompt, another message, "For records-list, type the field number, for keyboard entry, type 0" displays. Type a 0 to instruct OMEGA that the information will be entered from the keyboard, then press RETURN. OMEGA then inserts a merge marker, an upside down Y, on the screen to indicate where information will go.

3. **Define the end of the field:** Define the end of the field by pressing COMMAND and typing MF. A merge marker surrounded by a pair of field markers now displays on the screen. These markers indicate a field.

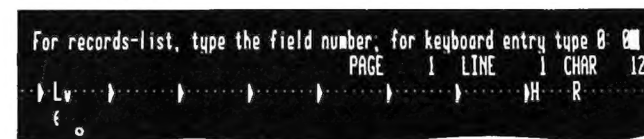
Repeat these steps until you have defined all fields in the record.

4. **End the record:** When you have entered all of the fields, press COMMAND and type EP (End Page) to mark the end of the record.
5. **Save and name the mask:** When you have defined each field and ended the record, save and name the mask. This name cannot contain spaces, punctuation, or more than 11 characters. It is helpful to use the word "mask" in the name so that the mask is easy to identify.

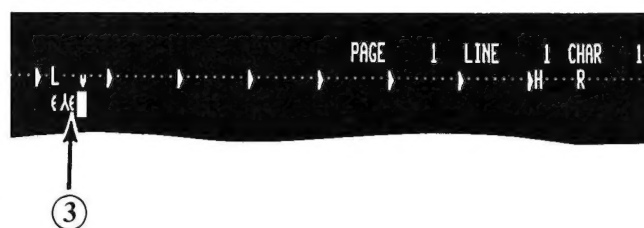
Define Field Beginning and Type Prompt



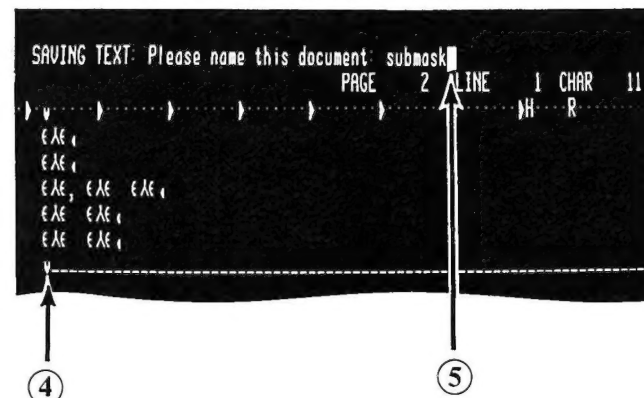
Instruct OMEGA That Information Will be Entered From Keyboard



Define End of Field



End Record and Save and Name Mask



Using a mask to help you build a records list

Now that you have made a mask and saved it on a disk, you can use it to help you build a records list. Recall it each time you want to add a record to the list. It serves as a reminder, giving prompts that help you type the appropriate information, in the correct order, in each field.

1. **Set the left margin:** On a clear screen, change the left margin to 1.
2. **Recall the mask:** Type the name of the mask and press RECALL.
3. **Type the information in the first field:** When you recall the mask, the cursor automatically moves to the first merge marker, and the first prompt displays in the message area. Type the information requested by the prompt. If you make any errors, you can use the BACKSPACE key to correct them.
4. **End the first field entry:** To tell OMEGA that you have finished answering the prompt, press the RED key. The cursor then moves to the next merge marker, and the second prompt displays in the message area.

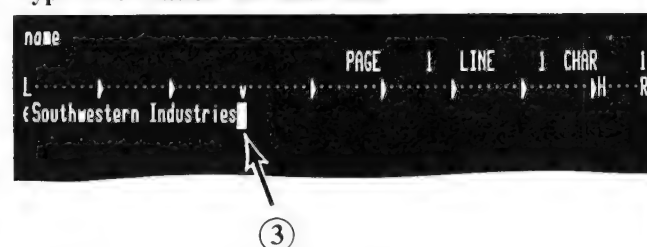
Respond to the prompts and type the information for all fields in the first record. You will know that the first record is complete when no more prompts appear and you see an end page marker.

5. **Type the remaining records:** For each record that you want to add to the records list, type the name of the mask and press RECALL. Then repeat the steps for entering information in each field.
6. **Save and name the records list:** When you have typed all the information for your list, save and name the records list. The name can be up to 35 characters long, including spaces and punctuation. Using the word "list" in the name, as in "Customer List," makes it easy to locate.

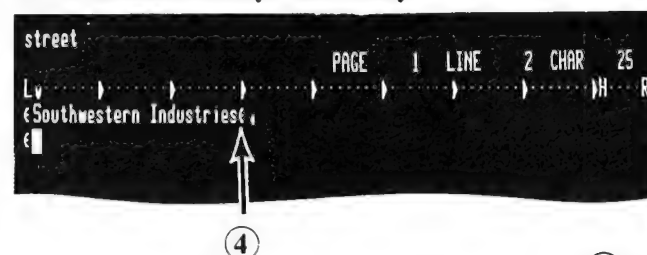
RECALL the Mask



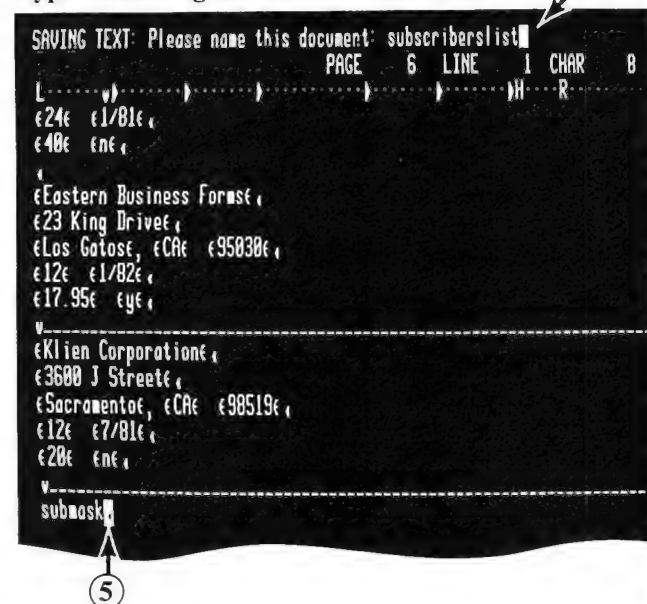
Type Information in First Field



End First Field Entry - RED Key



Type Remaining Records and Save List



Step 3. Updating the records list

You can easily recall a records list and change it at any time. You might need to add new records to the list or remove old ones.

Adding records to the list

1. **Recall the list:** Display the appropriate Index and recall the list to the screen.
2. **Move the cursor to the end of the list:** Press HOME HOME DOWN to move the cursor to the last line of the records list.
3. **Recall the mask:** Type the name of the mask you used to build the records list and then press RECALL, as shown in the illustration.
4. **Type the information for the new records:** Respond to the prompts that display to enter each new record on the records list. Use the procedures you used when creating the list.

Deleting or changing records from the list

You can recall the records list to the screen and revise it as you would any other document. If you delete an entire record, remember to delete the page break symbol that designates the end of the record as well.

RECALL List, Then RECALL Mask

```

PAGE 5 LINE 1 CHAR 8
L
v
€Los Gatos€, €CA€ €95030€,
€12€ €1/82€,
€17.95€ €y€,
v-----
€Klien Corporation€,
€3600 J Street€,
€Sacramento€, €CA€ €98519€,
€12€ €7/81€,
€20€ €n€,
v-----
€Johnson Electronics€,
€Gateway Memorial Drive€,
€Pittsburg€, €PA€ €15222€,
€12€ €1/82€,
€17.95€ €y€,
v-----
submask
1

```

② ③

Type Information for New Records

```

state
PAGE 4 LINE 3 CHAR 14
L-----v-----
€Sacramento, €CA€ €98519€,
€12€ €7/81€,
€28€ €n€,
v-----
€Johnson Electronics€,
€Gateway Memorial Drive€,
€Pittsburg€, €PA€ €15222€,
€12€ €1/82€,
€17.95€ €y€,
v-----
€Chamber Brass Library€,
€P.O. Box 9230€,
€Morton Grove€, €IL

```

④

Summary

In this section you learned that a records list is a collection of related information that is frequently used. You also learned how to build and revise a records list. A summary of the steps you follow is given below.

Steps for creating a records list

1. Design the record Decide the amount and type of information to store in each record. Organize that information into fields. Make a sketch that shows the names and order of the fields within the record.
2. Build the records list a. Make a mask by transferring the sketch from paper to the screen.
b. Use the mask to type the information for each record on the list.
3. Update the records list Add, delete, or edit records as necessary.

Now complete the review questions on the next page.

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A.

B.

C.

National Systems, Inc.

A. _____ B. _____ C. _____

- _____ 1. Type the information for each record on the list.
- _____ 2. Add and delete records as necessary.
- _____ 3. Organize record information into fields.
- _____ 4. Make a mask.
- _____ 5. Decide the amount and type of information to store in each record.
- _____ 6. Make a sketch.

Section 1: Creating a Records List (Cont.)

Printing a records list

When you have typed your records list, you can print it, or you can save the list to print at a later time. When you print a list, the records are printed without field markers. You can print a records list in two ways. You can produce a draft copy or a final copy. A draft list is printed on continuous form paper without regard for formatting. It starts at the top of the first page and continues without page breaks until the end of the list. As a result, records may print over the perforation in the paper. You can print a draft copy when the appearance of the printed records list is not of primary importance. In a final copy of a list, the page breaks are planned, making the list easy to read and giving it a neat appearance.

Printing a draft list

On a records list, records are separated by page breaks. When you print the list, however, you will not want to print just one record on each page. To prevent this, you can change the settings relating to page length on the Document Status Menus.

Before you print a draft list, display the list on the screen and look for the longest record. Add one more line to this number to include the page break marker. Then display Document Status Menu One and change the "Maximum number of lines per page" settings to correspond to the longest record (including the page break) in your list. When you have changed both of these settings, display Document Status Menu Two. Change the "Paper length, lines" setting to the same number of lines. For example, if your longest record is 10 lines and you add one for the page break, the total is 11 lines. You would therefore change the "Maximum number of lines per page" and "Paper length" settings to 11.

Because you are printing on continuous form paper, you may have to change one other setting. The "Wait between pages [Y/N]" setting on the Printer Status should be set at N. Also, since the left margin of the list is set at one, you may want to use the Printer Status selection for adding spaces to the left margin. When the Document Status Menus and Printer Status have been changed, you can print the list as you would any other document.

Draft List

Look for longest record

```
€National Systems, Inc.€  
€445 E. 24th St.€  
€Kansas City€  
€MO€  
€64141€
```

Change Document Status Menus

DOCUMENT STATUS MENU ONE

Max. lines on the first page:.....6
Max. lines on following pages:.....6

DOCUMENT STATUS MENU TWO

Paper length, lines:.....6

For a list printed in final form, you will want the pages to be of uniform length with no information printed on the perforations between continuous sheets. To accomplish this, you repaginate your list.

Before you print a final list, you copy the list and give the copy a new name. In this way, you retain the original for records processing use. Recall the copy of the list to the screen and display Document Status Menu One. The default setting for the maximum number of lines per page (55) can be used for your final list, or you can select any other setting. Check Document Status Menu Two to make sure that the paper length setting is appropriate. When the Document Status Menus are set to your satisfaction, redisplay the list. With the cursor positioned on line 1, press the PAGINATE key. You can prevent a record from being split by moving the cursor up to change a page break. When pagination is complete, you can print a final list on continuous form paper or single sheets. Again, you can use the Printer Status selection for adding space to the left margin.

Now complete the review questions on the next page.

Copy List

```
SAVING TEXT: Please name this document: copysublist
Index for DISK1      313 FREE PAGES      TIME: 10:34:49

DOCUMENT NAME      AUT      CREATED      REVISED      PAGES
Jones letter      jer      02/19/82      02/19/82 00:08      4
Smith letter      bt      02/19/82      02/19/82 00:08      1
Sales report/Jan      ag      02/19/82      02/19/82 00:15      2
Annual Report/1st draft      jer      02/19/82      02/19/82 00:13      17
Sample sales letter      ag      02/19/82      02/19/82 00:15      1
Blockname      03/30/82      00/00/00 00:00      1
submask      04/26/82      00/00/00 00:00      1
+subscriberslist      04/26/82      00/00/00 00:00      1
```

```

Press RETURN when the cursor is on the last line of the page.
PAGE 1 LINE 55 CHAR 1
-----H-----R-----
€Sacramento€, €CA€ €98519€,
€12€ €7/81€,
€20€ €€,
€
€Johnson Electronics€,
€Gateway Memorial Drive€,
€Pittsburgh€, €PA€ €15222€,
€12€ €1/82€,
€17.95€ €y€,
€
€Chamber Brass Library€,

```


Section 2 Review Questions

1. What is the main difference between a draft list and a final list?

2. In what situations would you want to print a draft list in your office?

3. When would a final list be more appropriate?

Check the answers on Page 48 of this system guide. Then go to the next page and complete the disk instruction for this section.

Disk Instruction

The disk instructions for this section, **Creating and Printing a Records List**, are given to you in print, not on the screen. This is necessary because the examples require you to display a clear screen and saved documents. You would be unable to follow directions given on the screen.

Before you begin the examples, do the following:

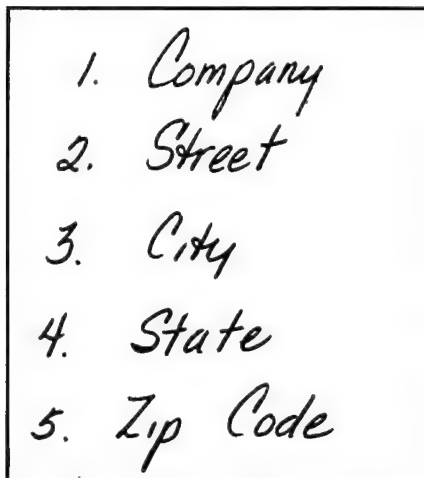
- Turn on the system, if necessary, and insert the Master disk into Drive A.
- Fill in the date and time.
- When the margin scale appears, insert your Training disk into Drive B.

In these examples, you will view a sketch, a mask, and a records list. You will then practice designing a record, building a records list, updating the list, and printing the list.

1. **Viewing a sketch, a mask, and a records list:** The first step in creating a records list is to make a sketch of a record that shows what information it will contain and how that information will be organized into fields. You then create a mask on the screen using your sketch, and use this mask to type your records list.

A. EXAMPLE - View a sample sketch

In this example, study the Sample Sketch below. Notice the five fields that have been designated to organize the necessary information.



B. EXAMPLE - View a mask

In this example, you will recall a precreated mask that corresponds to the sketch in Example A and examine its features.

1. Display the Index of your Training disk and recall document 11.1 Mask.
2. Note that each field consists of two field markers ({{)) surrounding a merge marker (Λ).
3. Enter Trace Mode—(CTRL) TRACE. Use the FIND key to read the contents of the merge markers.
4. Note that the name of the mask is typed on the last line. This is a short cut for creating a records list. Instead of retyping the mask name each time you type a record, you can use the pretyped name to recall the mask.
5. Clear the screen.

CONTINUE THIS EXAMPLE ON THE NEXT PAGE

Disk Instruction (Cont.)

C. EXAMPLE - View a records list

In this example, you will view a records list. This list corresponds to the mask you viewed in the last example.

1. Display the Index of your Training disk and recall document 11.1B List.
2. Scroll through the records list. Note that the merge markers have been replaced by the appropriate text.
3. Clear the screen.

CONTINUE TO THE NEXT EXAMPLE

2. **Creating a sketch, a mask, and a records list:** In the following examples, you will create a sketch, a mask, and a records list.

A. EXAMPLE - Designing a record and making a sketch

Below is the kind of information you need to design a record. Read it and decide what fields the record should contain. Then, on a sheet of paper, make a sketch of the record, giving each field a name and a number. Remember that a records list has greater flexibility when the fields contain small amounts of information.

The Protect-all Insurance Agency wants to save information about its policy holders in a records list. The list will be used for sending out announcements and services. It should contain the following information: the policy holder's name and address, the type of insurance, and a salutation for letters (Mr., Mrs., or Ms. and the policy holder's last name).

When you finish, turn to page 49 to compare your sketch with the sample. Then return to this page and continue to the next example.

B. EXAMPLE - Making a mask

After you design a record, you create a mask. In this example, you will make a mask by transferring the sketch you made to the screen.

1. On a clear screen, identify the beginning of the first field by pressing COMMAND and typing MF (Make Field).
2. To create a prompt, hold (CTRL) and press MERGE. The message "Type a message for the typist" displays in the message area.
3. Type a description of the first field—policy holder's name—and press RETURN. A second message "For records-list, type the field number; for keyboard entry, type 0" displays.
4. You will enter information in the mask from the keyboard, so type a 0, then press RETURN.
5. Identify the end of the field by pressing COMMAND and typing MF. A merge marker surrounded by two field markers now displays on the screen. Press RETURN.

CONTINUE THIS EXAMPLE ON THE NEXT PAGE

Disk Instruction (Cont.)

6. Create the remaining fields—policy holder's street address, city, state, zip code, type of insurance, and salutation—by identifying the beginning of each field, creating an appropriate prompt, and identifying the end of each field. COMMAND MF, (CTRL) MERGE, COMMAND MF.
7. Press RETURN after the last field marker so that the page break will appear on a separate line.
8. End the record by pressing COMMAND and typing EP (End Page).
9. Save the mask and name it MASK.

C. EXAMPLE - Creating a records list

You will now use the mask you just created to build a records list. Use the sample customer information below.

Customer Name	Address	Type Insurance	Salutation
Thelma Jones	45 Roe St. New York, NY 10090	Auto	Dear Thelma
Fred Ames	900 Broadway Rye, NY 10025	Home	Dear Mr. Ames
Andrew Brown	6 First St. Newburgh, NY 12550	Fire	Dear Mr. Brown
Harold Hill	9 Powell Ave. Monroe, NJ 07111	Home	Dear Harold
Barbara Tudor	80 Park Ave. Queens, NY 10002	Auto	Dear Mrs. Tudor

1. On a blank screen, set the left margin at 1.
2. Recall the mask you created by typing MASK and pressing RECALL.
3. Type the information requested by the first prompt—policy holder's name. If you make an error, correct it with the BACKSPACE key.
4. Press the RED key when you finish typing the information for the first field—policy holder's name. The cursor moves to the next field and the next prompt appears.
5. Respond to the prompts and use the RED key to finish typing the first record. A page break displays on the screen when the first record is complete.
6. To add the next record to your list, type MASK on the line following the page break, then press RECALL. Respond to the prompts and repeat for all records.
7. When you have typed all five records, save the records list and name it LIST.

CONTINUE TO THE NEXT EXAMPLE

Disk Instruction (Cont.)

3. Updating a records list: To revise a records list, you recall it and add, delete, or revise information as necessary.

A. EXAMPLE - Add a record to a records list

In this example, you will recall the records list you created in the last example, and add a new record to the list.

1. Display the Index of your Training disk and recall LIST.
2. Press HOME HOME DOWN to move the cursor to the end of the document.
3. To recall the mask you used to create the list, type MASK and press RECALL.
4. Type the information given below for a new customer. Refer to the previous example or to your Instructional Guide if you are unsure of procedures.
5. Save the updated list. Instruct OMEGA to update the original.

Customer Name	Address	Type Insurance	Salutation
Mason Fink	56 Monroe St. Asbury Park, NJ 07122	Home	Dear Mr. Fink

CONTINUE TO THE NEXT EXAMPLE

4. Printing a records list: Once a records list is created, OMEGA offers two options for printing it. If appearance is unimportant, you can print a draft list, which starts at the top of continuous form paper and continues without page breaks until the end of the list. You will not practice this option in the disk instruction for this section. Or, if you want the list to be neat and easy to read, you can print a final list by specifying where you want each page of the list to end.

A. EXAMPLE - Printing a final copy

In this example, you will print the precreated records list you examined in Example 1—11.1B List—as a final copy.

1. Display the Index of your Training disk and copy document 11.1B List with the name FINAL LIST. (CTRL) COPY, type new name, and press RETURN.
2. Recall FINAL LIST.
3. Display Document Status Menu One and change the “Max lines on the first page” and “Max lines on the following pages” settings to 35. Press RETURN to redisplay the list.
4. With the cursor on line 1, press PAGINATE. OMEGA shows you where the page break occurs. Press RETURN to set the page break on that line. If you wish to change it, move the cursor up to the line where you want the page break and press RETURN.
5. Display the Printer Status and change the “Spaces added to left margin” setting to 10.
6. Print the list. The resulting printout should contain approximately 35 lines on each page.

You have now completed Section 2. Turn to the next page to begin Section 3.

Automatic letter writing

Once you have created a records list, you can instruct OMEGA to use the records to produce any number of letters or other documents. With automatic letter writing, you can merge information from your records list with a standard document. You first create the letter or other standard document with merge markers indicating where the records list information will be included. You can then instruct OMEGA to pull the desired information from the list and insert it into the letter automatically.

Creating the letter

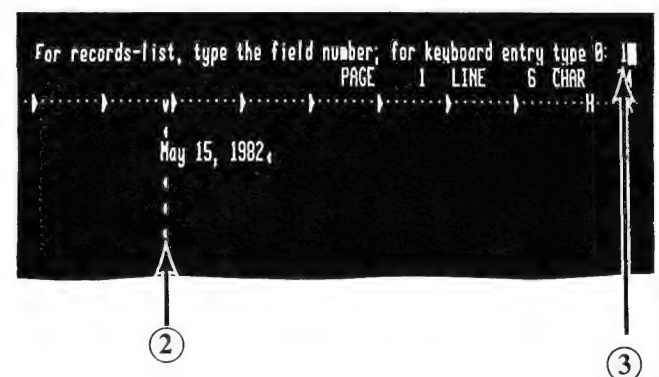
Your letter might be a form letter that you send out repeatedly to customers. A monthly statement is an example of a repeated letter. Or, your form letter might be a one-time mailing that you send to all of the people on a mailing list, such as a new product announcement. When you create a form letter, you insert merge markers that indicate what information will be drawn from the list and where this information will be located in the letter. This information can be a name, an address, or any other information contained in a field. Create a letter in the following way.

1. **Locate the sketch or printed records:** You will find it helpful to have the sketch you used to make the mask or a printed version of the records list on hand. They help you remember the order in which the fields appear in each record and the kind of information the fields contain.
2. **Type the letter to the point of the first merge entry:** Type the letter until you reach a place where you want to insert information from the records list.
3. **Indicate what information will come from a list:** To let the system know that a merge will take place here, create a merge marker by pressing (CTRL) MERGE. A message then displays: "Type a message for the typist." Because the information is already contained in your records list, you do not need to respond to this prompt. Simply press RETURN. Another message then displays: "For records-list, type the field number, for keyboard entry, type 0." You want to draw information from your records list, so follow the first instruction. Look at your sketch of the records list and type the number of the field that you want merged at this location in your letter. Press RETURN, and a merge marker displays in the text.

Sketch of Record

1. Company		
2. Street		
3. City	4. State	5. Zip
6. No. of issues		7. Start with
8. Amount due		9. Paid

Type Letter to Point of First Merge Entry Indicate Information to Come From List



4. **Complete the letter:** Continue typing the letter, inserting merge markers and the appropriate field numbers where you want information merged. You should include soft hyphens in your letter because the space used by the merged information may vary. OMEGA may request hyphenation when you perform a merge if you do not include soft hyphens. When you have finished typing, save and name the letter.

Complete the Letter

```
SAVING TEXT: Please name this document: formletter
PAGE 1 LINE 1 CHAR 11
May 15, 1982,
Dear A:
Thank you for your subscription to Off Magazine. Your
payment of $A is now due. This payment entitles you to
A issues.
Sincerely,
```

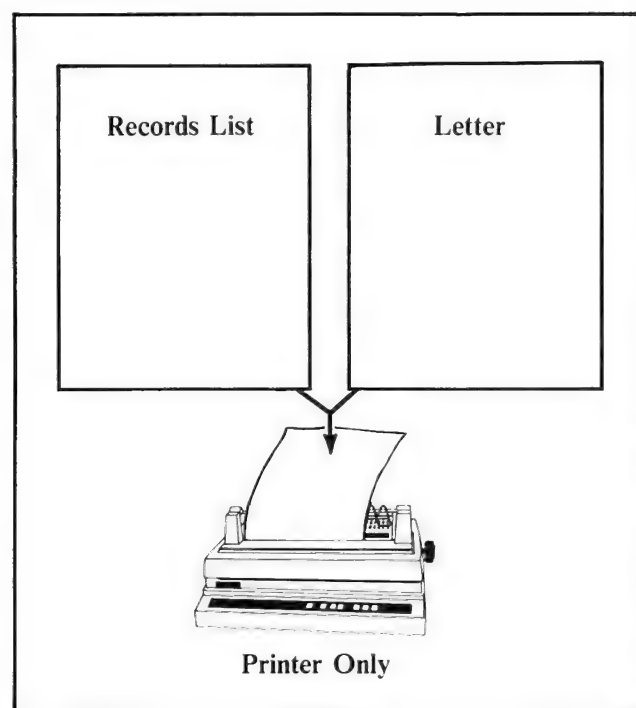

Merging the letter with a records list

During the merge process the system goes to the records list to pull information from each of the fields indicated. OMEGA inserts this information in the letter in place of the merge markers. The merge creates a new document for each record until the entire records list is processed or until the merge is stopped. When you use the automatic letter writing feature, you can instruct OMEGA to merge the list and letter automatically at the printer, or to merge them one by one on the screen.

- **Merging at the printer:** You can use this method if it is not necessary to save the merged letters. When you merge at the printer, the system merges each record in the list with the standard letter. The merged letters are printed but not saved on a disk. Once this type of merge begins, you can use the screen for other purposes.

On a clear screen press **COMMAND** and type **MP** (Merge Printer). A message displays asking if you want a selective merge. Type **N** (no) and another message displays. This message instructs you to position the cursor on the letter and press **MERGE**. Then you are prompted to position the cursor on the records list and press **MERGE**.

Merging at the Printer

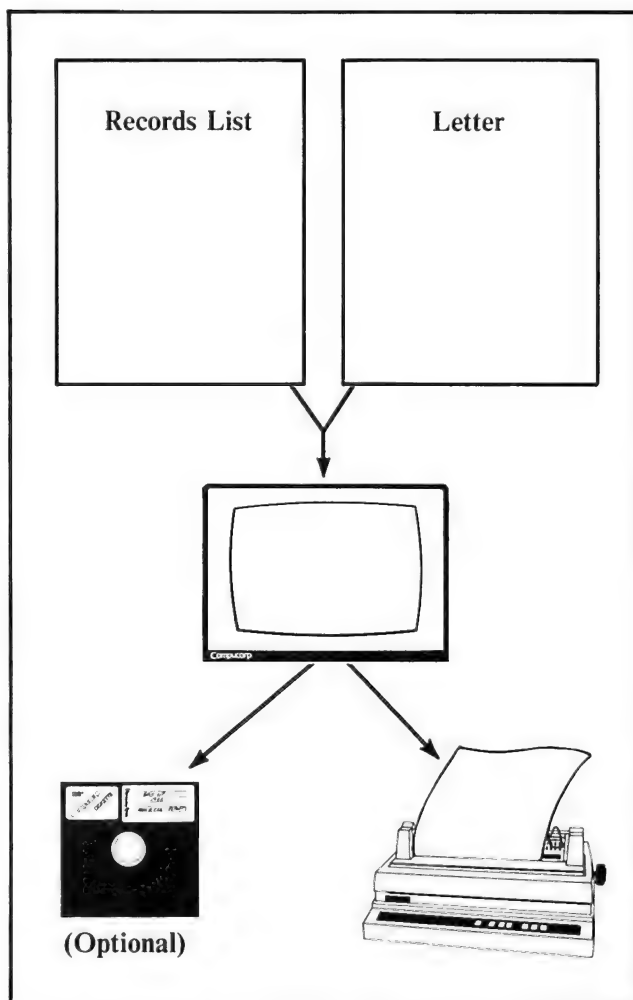


- **Merging on the screen:** This method allows you to see the merged letter on the screen. You can then instruct the system to print or save the letter. You can also merge all records with the letter, save them, and then print them all at the same time.

On a clear screen press COMMAND and type MS (Merge Screen). OMEGA displays a message asking if you want a selective merge. Type N (no) and another message displays. This message instructs you to position the cursor on the letter and press MERGE. Then you are prompted to position the cursor on the records list and press MERGE. The merged letter displays on the screen, and you can then edit, print, or save the letter.

To continue merging records, you can press COMMAND (CTRL) MERGE. Separate them with end page markers. When the merge is complete, you can then save and print all the letters.

Merging on the Screen



Using keyboard entry during merge

Sometimes you may want to include a keyboard entry, as well as information from a records list, in your standard letter. You can do this easily by telling OMEGA you want a keyboard entry as you type the standard letter. At the point where you want a keyboard entry, press (CTRL) MERGE. When a message displays, type a description of the kind of entry you will make. Then press RETURN and type 0 to indicate a keyboard entry. When you perform a merge to the screen, OMEGA will stop at this location and display the description you typed in the message area. You then type the entry and press the RED key, and the merge continues.

Interrupting a merge

On occasion you might want to stop a merge that is in progress. You might do this to correct an error or because you have reached the end of the work day. You can instruct OMEGA to interrupt a merge at any point. You can then ask for a merge report, which tells you how many records in the list have already been merged. You can use this information to resume the merge at a later time from the point where it was stopped.

You can end a merge by pressing COMMAND and typing ME (Merge End). To find out how much of the merge has been completed, press COMMAND and type MR (Merge Report). OMEGA then displays the number of records in the list that have already been merged with the letter.

To resume the merge, you create a selection document. The procedure for creating a selection document is covered in Section 6 of this system guide.

Go to the next page and complete the disk instruction for this section.

Including Keyboard Entry

Indicate Keyboard Entry

```

Type a message for the typist: enter date
PAGE 1 LINE 12 CHAR 27
-----L-----V-----H-----R
|
| May 15, 1982,
|
|
|
|
|
|
| Dear
|
| On

```

```

For records-list, type the field number; for keyboard entry type 0:
PAGE 1 LINE 12 CHAR 27
-----L-----V-----H-----R
|
| May 15, 1982,
|
|
|
|

```

Perform Merge to the Screen

```

enter date
PAGE 1 LINE 12 CHAR 1
-----L-----V-----H-----R
|
| On June 2, 1982

```

Result of Keyboard Entry

```

PAGE 1 LINE 20 CHAR 38
-----L-----V-----H-----R
|
|
| Mrs. Freida Smith,
| Smith Personnel Agency,
| 775 N. Lilac Street,
| Culver City, California 90230,
|
| Dear Mrs. Smith,
|
| On June 2, 1982 we will be visiting your area. As you
| indicated an interest in learning more about our
| we would be happy to

```

Merge Report

```

10 records were looked at. Press RETURN to continue.
PAGE 1 LINE 1 CHAR 11
-----L-----V-----H-----R

```

Disk Instruction

The disk instructions for this section, Automatic Letter Writing, are given to you in print, not on the screen. This is necessary because the examples require you to display a clear screen and saved documents. You would be unable to follow directions given on the screen.

Before you begin the examples, do the following:

- Turn on the system, if necessary, and insert the Master disk into Drive A.
- Fill in the date and time.
- When the margin scale appears, insert your Training disk into Drive B.

1. Viewing a letter and merging it with a list: A letter created for automatic letter writing contains merge markers. These markers will be replaced by information from a records list when a merge is performed. In the following examples you will examine a letter and merge this letter with the list you created in the disk instruction for the last section.

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A. EXAMPLE - View a letter

In this example, you will recall a letter containing merge markers for automatic letter writing.

1. Display the Index of your Training disk and recall document 11.3A Letter.
2. Note the four merge markers in the text.
3. Turn on Trace Mode and use the FIND key to read the contents of these markers. Notice that they correspond to the four fields that you created in the disk instruction for Section 1—the name of the policy holder, the address, the salutation, and the kind of policy owned.
4. Clear the screen and recall the list you created for Section 1—LIST. These are the records you will merge with the letter you just viewed. The merge markers in the letter will be replaced by fields from these records.
5. Clear the screen.

B. EXAMPLE - Merge a letter and a list on the screen

In this example, you will merge the letter and the list you just viewed.

1. To instruct OMEGA to perform a merge on the screen, press COMMAND and type MS.
2. When a message displays asking if you want a selective merge, type N (no).
3. The Index displays on the screen and a message asks you to place the cursor on the letter and press MERGE. Position your cursor on 11.3A Letter. Hold (CTRL) and press MERGE.
4. Another message displays. Identify the list for OMEGA by positioning the cursor on LIST, holding (CTRL) and pressing MERGE.
5. The letter is merged on the screen with the first record. To merge the next record, press COMMAND, hold (CTRL), and press MERGE.

CONTINUE THIS EXAMPLE ON NEXT PAGE

Disk Instruction (Cont.)

6. Repeat step 5 until OMEGA gives you a message telling you that the merge is complete, then press RETURN. When OMEGA tells you it is saving text, name this document MERGED LETTER.
7. Scroll through the letters and notice that the merge markers have been replaced by information from the fields on the list.
8. Save the document.

CONTINUE TO THE NEXT EXAMPLE

2. **Creating a letter and merging at the printer:** Now that you have seen how OMEGA's merge feature works, you will create your own letter with merge markers, and merge this letter with your list.

A. EXAMPLE - Create a letter

Now you will create the sample letter below to be merged with your list.

Sample Letter

July 22, 1983

(Policy Holder's Name)
(Street Address)
(City), (State) (Zip Code)

Dear (Salutation):

As one of our long standing customers holding a (type of insurance) insurance policy, you know that we have been active in Middlebury for ten years. We are happy to announce that on September 1, we will be opening a branch office in the nearby community of Centerville. We hope that this added facility will help us serve you better.

Sincerely,

Alfred Malcolm, Vice President

1. On a clear screen, type the date as shown in the sample letter, then press RETURN four times. You have now reached the first place where information will be merged from the list—the name of the policy holder.
2. To create a merge marker, hold (CTRL) and press MERGE.
3. When the message appears, press RETURN because the information will come from a list.
4. When the next message appears, type 1, because that is the field number of the policy holder's name. Then press RETURN. A merge marker displays.

CONTINUE THIS EXAMPLE ON NEXT PAGE

Disk Instruction (Cont.)

5. Press RETURN so that the next information—the street address—will appear on the next line. Then create another merge marker, indicating field 2 as the source of information for this area.
6. Press RETURN again so that the next information—the city—will appear on the next line. Then create a merge marker indicating the field containing the city—field 3.
7. Type a comma and a space. Then create a merge marker and identify the field for the state—field 4.
8. Type two spaces. Then create a merge marker and identify the field for the zip code—field 5.
9. Press RETURN twice to separate the address from the next area of information—the salutation. Type “Dear” and a space. Then create a merge marker indicating field 6—the field containing the salutation. Then type the colon.
10. Return twice and type the letter up to the point where the type of insurance should be inserted. Create a merge marker—field 7.
11. Finish typing the letter, then insert soft hyphens in the longer words.
12. Save the letter and name it YOUR NAME LETTER.

CONTINUE TO THE NEXT EXAMPLE

B. EXAMPLE - Merge the letter and list at the printer

You will now merge the letter you have created with your list. Make sure paper is in your printer, and that the printer is turned on.

1. On a clear screen, press COMMAND and type MP.
2. When a message displays, asking if you want a selective merge, type N (no).
3. When the Index displays on the screen, respond to the message to position the cursor on YOUR NAME LETTER and press MERGE.
4. Identify the list for OMEGA by positioning the cursor on LIST and pressing MERGE.
5. The merged letters will be produced automatically at the printer.

You have now completed Section 3. Turn to the next page to begin Section 4.

Creating address labels and envelopes

You can also use OMEGA's merge feature to create labels and envelopes. This procedure is similar to automatic letter writing. The two main differences are that the records list is merged with an address pattern instead of a form letter, and the results are printed address labels or envelopes instead of stationery.

Procedure

1. **Set up the format of the pattern:** On the Document Status Menu set the margins to correspond to the label or envelope. For example, margins of 40 and 80 would be appropriate for a standard 4 inch by 9 1/2 inch envelope. Then change the "Max. lines on the first page," "Max. lines on the following pages" and "Paper length, lines" settings to match the length of the label or envelope. For example, you would specify 24 lines for a four inch envelope printed with six lines per inch.
2. **Create the address pattern:** To print envelopes or labels, you type an address pattern instead of a form letter. This pattern, like a form letter, uses merge markers to indicate what fields of information should be pulled from the records list. The location of the merge markers indicates where this information will be positioned on the label or envelope. To create a pattern, display a clear screen and create a merge marker on the appropriate line and character position for each field representing the name and address. You can also include punctuation or text, such as "First Class Mail." When you have finished, save and name the pattern. In the address pattern illustrated, the merge marker on the first line is for the company name, and the second marker indicates the street address. On line 3, a merge marker indicating the city is followed by a comma. After this are markers representing the state and the zip code fields.
3. **Merge at the printer:** Press COMMAND and type MP to instruct the system to perform the merge at the printer. When a prompt displays asking what letter to merge, instruct OMEGA to use the address pattern.

Go to the next page and complete the disk instruction for this section.

Merging Address Pattern With Records List

Records List

PAGE	1	LINE	1	CHAR	11
L	H	R
Mrs. Freida Smith, Smith Personnel Agency, 775 N. Lilac Street, Culver City, California 90230, Mrs. Smith, 56 150 65					
Mrs. Susan Edwards, 643 Wacker Blvd., Culver City, California 90008, Ms. Edwards, 24 135 59					
Mr. George Evans, First Bank of San Marino, 6400 W. Olympia Ave.,					

Address Pattern

PAGE	1	LINE	1	CHAR	1
L	H	R
A A A					

Envelopes

Mrs. Susan Edwards
643 Wacker Blvd.
Culver City, California 90008

Mrs. Freida Smith
Smith Personnel Agency
775 N. Lilac Street
Culver City, California 90230

Labels

Mrs. Freida Smith
Smith Personnel Agency
775 N. Lilac Street
Culver City, California 90230

Mrs. Susan Edwards
643 Wacker Blvd.
Culver City, California 90008

Mr. George Evans
First Bank of San Marino
6400 W. Olympia Ave.
San Marino, California 91101

Ms. Sally John
552 Hamilton Street
Culver City, California 90230

Disk Instruction

The disk instructions for this section, **Envelopes and Address Labels**, are given to you in print, not on the screen. This is necessary because the examples require you to display a clear screen. You would be unable to follow directions given on the screen.

Before you begin the examples, do the following:

- Turn on the system, if necessary, and insert the Master disk into Drive A.
- Fill in the date and time.
- When the margin scale appears, insert your Training disk into Drive B.

1. Creating a pattern for envelopes and merging it with a list: You can use OMEGA's merge feature to print mailing addresses on labels or envelopes. In the following examples, you will create a pattern and perform a merge at the printer to produce mailing envelopes.

A. EXAMPLE - Creating a pattern

In this example, you will set up the appropriate format and create a pattern for address envelopes. For this exercise, assume the envelope is 4 inches long.

1. From a clear screen, display Document Status Menu One. Set a left margin at character position 40 and a right margin at character position 80. Next, change the "Maximum number of lines per page" settings to 24 (4 inches x 6 lines per inch) to correspond to the envelope.
2. Display Document Status Menu Two and change the "Paper length, lines" setting to 24.
3. Press RETURN to redisplay the document.
4. To create a merge symbol for the company name on line 1, hold (CTRL) and press MERGE. When the message displays, press RETURN because the information will be drawn from the list. When the next message displays, type the field number—1—and then press RETURN.
5. Press RETURN to move to line 2 and create another merge marker indicating field 2—the street address—as the source of information for this line.
6. Press RETURN to move to line 3 and create a merge marker for field 3—the city. Then type a comma, a space, and create a merge marker for field 3—the state. Type two spaces and create a merge marker for the zip code. Press RETURN to end the line.
7. Save the pattern and name it YOUR NAME PATTERN.

CONTINUE TO THE NEXT EXAMPLE

Disk Instruction (Cont.)

B. EXAMPLE - Merging the pattern and the list at the printer

In this example, you will merge the pattern for envelopes with the precreated list, 11.1B List.

1. Display the Printer Status and make sure the "Wait between pages" selection is set at Y.
2. On a clear screen, press COMMAND and type MP.
3. When the Index displays, respond to the message by positioning the cursor on YOUR NAME PATTERN and pressing MERGE.
4. When the next message displays, position the cursor on 11.1B List and press MERGE.
5. When a message displays, insert a standard envelope into the printer and then press RETURN.
6. Repeat step 5 to print three more envelopes.
7. Cancel the merge by pressing COMMAND and typing ME (Merge End).

You have now completed Section 4. Turn to the next page to begin Section 5.

Generating reports

The third common use for OMEGA's merge feature is generating reports. A "report" in this context is a document which contains selected information from your records list. This information is arranged in rows and columns like a chart. Report generation is similar to automatic letter writing with one main difference. Instead of using each record to produce one merged letter, you use each record to create one entry of a report.

Overview

1. **Design the report:** Make a sketch of the report showing its format and the type of information it will contain. The sketch will help you keep track of the fields used in the report and of the tab settings.
2. **Create the report pattern on the screen:** In the report pattern, you use merge markers to indicate what fields will be merged and where the information will be placed. The merge markers must be set on tab stops so that the information that is merged will align properly.
3. **Create the frame:** The frame consists of text describing the contents of the report. The report title, column headings, and any introductory text can be part of the frame. In the frame, you also set the margins and tab stops for the headings, as well as tab stops to accommodate the entries that will be merged with the report.
4. **Generate the report:** Perform a “merge automatic” with the frame on the screen. When OMEGA asks you to position the cursor on a letter, you indicate that the report pattern will be used.

Generating Reports

Records List

	PAGE	1	LINE	1	CHAR	1
					R	

Mrs. Freida Smith, Smith Personnel Agency, €775 N. Lilac Street, €Culver City, €California€ €90230€, €Mrs. Smith€, €56€ €150€ €65€,						

Mrs. Susan Edwards, € €643 Wacker Blvd.€, €Culver City€, €California€ €90600€, €Ms. Edwards€, €24€ €135€ €59€,						

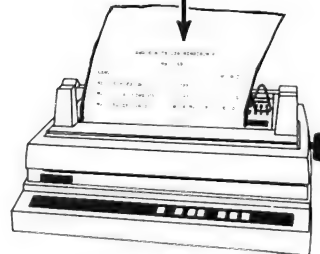
Mr. George Evans, First Bank of San Marino, €6400 W. Olympia Ave.,						

Report Pattern

Figure 1 shows a computer terminal screen with a text editor interface. At the top, it displays 'PAGE 1 LINE 1 CHAR'. Below this, a horizontal line represents the text being edited. A vertical cursor is positioned at the start of the line. Below the line, there are several lines of text, including 'DA', 'DA', and 'WA', which appear to be part of a data entry or editing process.

Report Format (Frame)

PAGE 1 LINE 8 CHAR 24
DANN HEALTH SPA MEMBERSHIP,
May 1982,
NAME CITY INT/AGE,



Step 1. Design the report

The first step in generating a report is deciding what information it will contain and where that information will appear. Making these decisions is easier if you make a sketch of the report.

Sketching out the report that you want to generate helps you determine both the content and the format of the report. The sketch should include the report title, column headings, and tab settings. It should indicate what fields are required from the records in the list and the tab settings at which those fields should be inserted.

Step 2. Create the report pattern on the screen

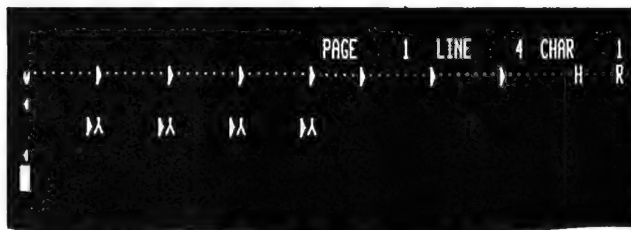
This step is very much like creating a pattern for printing envelopes. The pattern indicates the kind of information that will appear in the report. It uses merge markers to represent the fields that the system will pull from the records list. You create the merge markers on tab stops, using the system's standard settings.

- **Identify fields to be merged:** Press TAB, then press (CTRL) MERGE. You do not have to type a message for the typist because the information will be drawn from your records list. To create a pattern, you identify the fields that will be merged. Each entry must be typed on a tab stop, using the system default tab settings. For each field you want merged into the report, press TAB, then press (CTRL) MERGE. Respond to OMEGA's message by indicating what fields should be used at each tab stop.
- **Save and name the report pattern:** When you have identified all the fields, save and name the report pattern. This pattern will act like the "letter" when you merge it with a records list. Information drawn from the appropriate fields will replace the merge markers.

Design the Report

TITLE			
DATE			
tab(11)	(44)	(56)	(68)
Company	No. of	Subscription	Paid
	Issues	Fee	
(field #1)	(#6)	(#8)	(#9)

Create the Report Pattern



Step 3. Create the frame

Now that you have identified the content of the report, you can create a "frame." The frame includes descriptive text as well as the format settings for that text. You create a frame by typing the report title and column headings on the proper tab stops. When the report is generated, it will display on the screen in this format.

Starting on the first line, set the margins and tab stops to accommodate the information that will be drawn from the records list. Then, type the report title and the headings for each column. If the report is more than one page long, you can create a header for the page headings. You can save and name the frame for future use.

Step 4. Generate the report

After you have created the pattern and the frame, you can generate the report. With the frame on the screen, position the cursor below the column headings. Then, press COMMAND and type MA to instruct the system to perform a merge automatic. When the merge is completed, you can print the report from the screen or save the report and print it at a later time.

Now complete the review questions on the next page.

Create the Frame

```
PAGE 1 LINE 7 CHAR 11
-----M-----R-----
SUBSCRIPTION STATUS REPORT,
May 1982,
SUBSCRIBER          NO. OF ISSUES  FEE  PAID,
```

Generate the Report

```
COMMAND-
PAGE 1 LINE 7 CHAR 11
-----M-----R-----
SUBSCRIPTION STATUS REPORT,
May 1982,
SUBSCRIBER          NO. OF ISSUES  FEE  PAID,
```

Finished Report

```
PAGE 1 LINE 13 CHAR 11
-----M-----R-----
SUBSCRIPTION STATUS REPORT,
May 1982,
SUBSCRIBER          NO. OF ISSUES  FEE  PAID,
R. J. Howard & Sons, Inc.  24          48  In,
National Systems, Inc.    12          28  In,
Southfield Bank          24          17.95  In,
```

Review Questions

- Below are descriptions of each of the three merge options OMEGA offers. Identify each description as either a merge at the printer, a merge on the screen, or a merge automatic.
 _____ A. Lets you merge and save letters in one step.
 _____ B. Appropriate when you do not need to save merged letters.
 _____ C. Useful when you want to make changes to each letter as it is merged.
- Which of the above are used in report generation?
- The report generation process has three components. Label each of these components in the diagram below.

36

```

PAGE 1 LINE 1 CHAR 11
H R
DANN HEALTH SPA MEMBERSHIP,
May 1982,
NAME CITY INT/AGE,
  
```

A. _____

```

PAGE 1 LINE 1 CHAR 1
H R
Mrs. Freida Smith,
Smith Personnel Agency,
6775 N. Lilac Street,
Culver City, California 90230,
Mrs. Smith,
56 150 65,
Mrs. Susan Edwards,
643 Wacker Blvd.,
Culver City, California 90608,
Ms. Edwards,
24 135 59,
Mr. George Evans,
First Bank of San Marino,
6400 W. Olympia Ave,
  
```

B. _____

```

PAGE 1 LINE 1 CHAR
H R
  
```

C. _____

Check the answers on Page 48 of this system guide. Then, begin Section 6 on the next page.

Selection feature

When you instruct OMEGA to merge a records list with a "letter," the system uses all of the records in the list. Sometimes, you might not want the system to use all of the records. You might want only certain records that share common characteristics. For example, you might need to send letters to all employees in your company who were hired in 1979, and not to any others on the employee records list. By using the OMEGA selection feature, you can have the system select only those records from the records list and merge them with a letter. When the selection is complete, letters, envelopes, or reports will be generated only for certain records in the records list.

Selecting records

To perform a selection, you need three components—a records list, a "letter" (which may be a document other than a letter), and a selection document. The selection document provides the system with the information it needs to select specific records from the list.

Selection Document

```
PAGE 1 LINE 1 CHAR 11
START WITH "Mr. George Evans" IN FIELD (1),
WITH "San Marino" IN FIELD (3)
```

Records List

```
PAGE 1 LINE 1 CHAR 1
Mrs. Ireda Smith,
Smith Personnel Agency,
775 N. Lilac Street,
Culver City, California 90230,
Mrs. Smith,
56 150 65,
Mrs. Susan Edwards,
643 Wacker Blvd.,
Culver City, California 90608,
Ms. Edwards,
24 135 59,
Mr. George Evans,
First Bank of San Marino,
6400 W. Olympia Ave,
```

Letter

```
PAGE 1 LINE 1 CHAR 11
May 11, 1982,
Dear A,

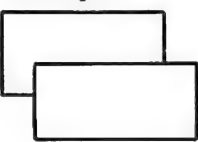
Your DAWN HEALTH SPA in A is now taking registration for our new class, "Fitness after 50". This program has been created with you and your unique exercise requirements in mind. There's a qualified


```

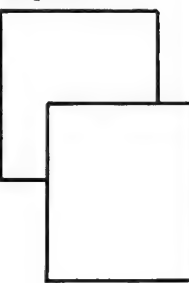
Letters



Envelopes



Reports



Create the selection document

A selection document tells OMEGA exactly what records in a list you want to merge with a letter. Before you create a selection document, you decide what records you want to select from your records list. You then type instructions for OMEGA describing the specific characteristics of those records. These selection document instructions must be typed in a certain format.

Selection document format

To type a selection document, you begin on a clear screen. You type your instructions to OMEGA using "keywords." The "criteria" on which the selection is based are also entered in a special format.

- **Keywords:** These are special words that the system recognizes as selection instructions. Each keyword must be typed on a separate line, in capital letters, and followed by a space. A list of keywords and their explanations follows.
- **Criteria:** The criteria you type complete the instruction. They provide the system with specific details about the records to be selected.

Use quotation marks to surround information that OMEGA is to select from a field. When you type information for OMEGA to look for, make sure it is typed exactly as it appears in the record.

Parentheses must be typed around field and record numbers so that OMEGA can recognize them as such.

Sample Selection Document



```
PAGE 1 LINE 1 CHAR 11
START WITH (18);
WITH "n" IN FIELD (9)
```

Selection instructions

In the selection document you can include one or more selection instructions. Keywords and their explanations are listed below. Parentheses mean that a field or record number follows that keyword. "---" means that you type specific text from a field after that keyword.

- **START WITH "---" IN FIELD () or START WITH ()**: This tells OMEGA to start merging with a record that contains certain information or at a specific point in the list, ignoring all records that come before. For example, assume you want to begin your merge with the Fisher Glass Company, using the sample records list shown at the right. You would type either START WITH "Fisher Glass Co." IN FIELD (1) or START WITH (6), meaning the sixth record in the list.
- **WITH "---"**: This instructs OMEGA to use only records *with* specific beginning text in the designated field. For example: WITH "146" IN FIELD (5) means select all records that begin with 146 in the zipcode, or field 5.
- **WITHOUT "---"**: This tells OMEGA to use only records *without* specific beginning text in a field. For example, WITHOUT "950" IN FIELD (5) instructs OMEGA not to select any records that begin with 950 in field 5. All the records in the sample at the right would be selected except "Eastern Business Forms."
- **BEFORE**: Only records with beginning text in a field that comes *before* specified numbers (numerically) or letters (alphabetically) will be selected. Example: BEFORE "40" IN FIELD (8). The merge will *not* include the records that have 40 in field 8.
- **AFTER**: Only records with beginning text in a field that comes *after* specified numbers or letters will be selected. Example: AFTER "17.95" IN FIELD (8). The merge will not include records that have 17.95 in field 8.
- **TO**: This instruction is similar to BEFORE. The difference is that the merge *will* include the specified information. Example: TO "40" IN FIELD (8).
- **FROM**: This instruction is similar to AFTER. The difference is that the merge *will* include the specified information. Example: FROM "17.95" IN FIELD (8).
- **MATCHING "--" IN FIELD ()**: This instructs OMEGA to use only records in which the entire contents of the field matches what is typed in quotes. For example: MATCHING "Pittsburgh" IN FIELD (3).

Selection Instructions

START WITH "---" IN FIELD (-)
START WITH (-)
WITH "--" IN FIELD (-)
WITHOUT "--" IN FIELD (-)
BEFORE "--" IN FIELD (-)
AFTER "--" IN FIELD (-)
FROM "--" IN FIELD (-)
TO "--" IN FIELD (-)
MATCHING "--" IN FIELD (-)
SEARCH FIELD (-) FOR "--"
XSEARCH FIELD (-) FOR "--"
COMPARE (-) "> (-)"
COMPARE (-) "< (-)"
COMPARE (-) "=" (-)"
COMPARE (-) ">= (-)"
COMPARE (-) "<= (-)"
COMPARE (-) "<> (-)"
LETTER "document name"
LIST "document name"
OR

Sample Subscriber List

Southfield Bank
355 Center Street
Southfield, IL 61703
24 13
37.95 y

Southwestern Industries
489 S. 5th Street
Albuquerque, NM 87103
24 1
40 n

Klien Corporation
3600 J Street
Sacramento, CA 98519
12 13
20 n

Eastern Business Forms
23 King Drive
Los Gatos, CA 95030
12 13
17.95 y

General Life Insurance Co.
14 Hillside
Fairfield, CT 06430
12 13
20 n

Fisher Glass Co.
55 Grove Street
Rochester, NY 14650
24 1
17.95 n

• **SEARCH FIELD:** OMEGA will use only records in which certain information is contained anywhere in a particular field. Example: SEARCH FIELD (8) FOR "95". Records that have 17.95 or 37.95 in field 8, for example, will be selected.

• **XSEARCH:** Only records in which certain informations *not* contained anywhere in a particular field will be selected. Example: XSEARCH FIELD (4) FOR "NY." The system will select all records *except* those that have NY in field 4.

• **>, <, =, or >=, <=, < >:** (COMPARE is not available on Level A.) OMEGA compares two fields in a record and uses only the records in which the comparison satisfies the instruction. Fields can be greater than (>), less than (<), equal to (=), greater than or equal to (>=), less than or equal to (<=), or not equal to (<>). For example, COMPARE (8) "> (7)" tells the system to select only those records in which field 8 is greater than field 7. The format is the same for all other comparison symbols.

• **LETTER or LIST:** (Not available on Level A.) This indicates which letter and list to merge. Example: LETTER "subscriberletter;" LIST "subscriberlist." Note: you can use this procedure in Autopilot.

• **OR:** This keyword is used when multiple instructions are needed. Example:

WITH "NY" IN FIELD (4)

OR

WITH "MA" IN FIELD (4)

This instructs OMEGA to select those records with NY *or* MA in field 4.

NOTE: You can use multiple selection instructions. For example:

WITH "9" IN FIELD (5)

WITH "n" IN FIELD (9)

The *and* is implied.

Sample Subscriber List

Southfield Bank
355 Center Street
Southfield, IL 61703
24 13
37.95 y

Southwestern Industries
489 S. 5th Street
Albuquerque, NM 87103
24 1
40 n

Klien Corporation
3600 J Street
Sacramento, CA 98519
12 13
20 n

Eastern Business Forms
23 King Drive
Los Gatos, CA 95030
12 13
17.95 y

General Life Insurance Co.
14 Hillside
Fairfield, CT 06430
12 13
20 n

Fisher Glass Co.
55 Grove Street
Rochester, NY 14650
24 1
17.95 n

Perform a selective merge

After you have typed and saved your selection document, you can perform a selective merge. You can instruct OMEGA to perform a selective merge at the printer, on the screen, or a merge automatic. After you indicate the desired type of merge, the message "Is this a selective merge?" displays on the screen. For a selective merge, answer Y (yes).

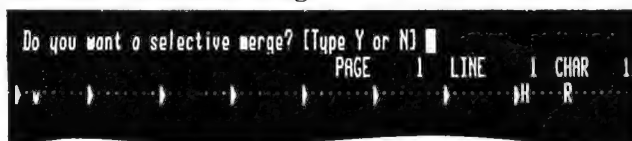
If you are a Level A user, OMEGA then displays a message asking you to "Place cursor on the selection document and press MERGE." After you do so, OMEGA displays another message asking you to position the cursor on the letter and press MERGE, then on the list and press MERGE again. When you do so, the merge is performed.

If you are a Level B user, after you indicate that you want a selective merge, the system will display the message "Enter selection document name or press RETURN." If you remember the name of the selection document, type it and press RETURN. If you just press RETURN, the Index displays and you will be prompted to position the cursor on the selection document. If you included the LETTER and LIST names in your selection document, the merge then takes place according to your criteria. Otherwise, OMEGA displays a message asking you to position the cursor on the letter and press MERGE, then on the list and press MERGE again. When you do so, the merge is performed.

When the merge is complete, the letters, envelopes, or reports created contain information only from the records that met the selection criteria. After a selective merge, OMEGA automatically gives you a report of how many records were looked at and how many met the selection criteria.

Now complete the review questions on the next page.

Indicate a Selective Merge



Section 6 Review Questions

1. List the three components needed to perform a selection.

2. List the two elements of a selection document format.

3. Practice writing selection documents.

Check the answers on Page 48 of this system guide. Then, begin Section 7 on the next page.

Sort feature

The OMEGA sort feature can rearrange the order of the records in a records list. For example, a records list that contains customers names and addresses might normally be arranged alphabetically by customer name. For a bulk mailing, however, the list can be sorted numerically by zipcode.

Sorting a records list

Before you can use OMEGA's sort feature, you need a records list and a sort document. The sort document tells the system which records list to sort and which fields to use in performing the sort. When you instruct the system to perform a sort, it sorts the records list, arranging the records in a new sequence. A sort report displays on the screen.

Records List

PAGE 1 LINE 1 CHAR 11
 L VERMONT
 E OHIO
 E NEW YORK
 E NEW MEXICO
 E NEW HAMPSHIRE
 E NEBRASKA
 E MONTANA
 E MISSISSIPPI
 E MAINE
 E IOWA
 E IDAHO
 E COLORADO
 E CALIFORNIA
 E ARIZONA
 E ALABAMA
 E NORTH DAKOTA
 E TEXAS

Sort Document

```

PAGE 1 LINE 1 CHAR 1
MAGASORT,
state names list,
FIELD (1),

```

Rearranged Records List

L	PAGE	LINE	CHAR	II
ALABAMA				
ALASKA				
ARIZONA				
ARKANSAS				
CALIFORNIA				
COLORADO				
CONNECTICUT				
DELAWARE				
FLORIDA				
GEORGIA				
HAWAII				
IDAHOW				
ILLINOIS				
INDIANA				
IOWA				
KANSAS				
KENTUCKY				

Creating a sort document

Before you can perform a sort, you create a sort document. This document tells the system which records list to sort and which field(s) to sort by.

Like a selection document, a sort document must be typed with a specific format. You begin with a clear screen, then type the desired sort instructions.

1. **Instruct the system to perform a sort:** On the first line of the sort document, you type OMEGASORT in all capital letters with no spaces.
2. **Type the required sort instructions:** You then type instructions telling OMEGA what records list to sort. Be sure to type the name exactly as it appears on the Index and enclose the name in quotation marks.

Then tell the system what field to sort the list by. This instruction must include the keyword FIELD followed by a space and the field number in parentheses.

If no other instructions follow these, the system will sort the records list in alphabetic ascending (A-Z, 0-9) order, as shown in the illustration. Alphabetic and ascending are the system default settings for a sort. The system performs the sort by looking at all characters in the field, from first to last.

3. When you have finished typing, save and name your sort document.

Performing the sort

To begin the sort, display the Index and position the cursor on the sort document name. Then press COMMAND and the GREEN key. The system reads the sort document and then searches for the records list to be sorted. OMEGA sorts the records list according to the instruction in the sort document. At the same time, the system displays a progress report on the screen. When the sort is completed, you have the same records list, but in a new order. If you have a list on Drive A under the same name, it will sort that document first.

NOTE: After you instruct OMEGA to perform a sort, a message may display telling you that not enough room is on the disk to perform the sort. During the sort, OMEGA makes a temporary copy of the list it is sorting, which is later deleted. If the disk does not contain enough space to save this copy, you can divide the list into two parts and sort each separately.

Sort Document

```
PAGE 1 LINE 1 CHAR 11
MEGASORT
"Subscribers List"
FIELD (1)
```

Before Sort

```
PAGE 1 LINE 1 CHAR 11
Southfield Bank,
355 Center Street,
Southfield, MI 48033
Southwestern Industries,
489 S. 5th Street,
Albuquerque, NM 87103
Klien Corporation,
3688 J Street,
Sacramento, CA 95819
Eastern Business Forms,
23 King Drive,
Los Gatos, CA 95030
General Life Insurance Co.,
```

After Sort

```
PAGE 1 LINE 1 CHAR 11
Eastern Business Forms,
23 King Drive,
Los Gatos, CA 95030
Fisher Glass Co.,
55 Grove Street,
Rochester, NY 14650
General Life Insurance Co.,
14 Hillside,
Fairfield, CT 06430
Klien Corporation,
3688 J Street,
Sacramento, CA 95819
Southfield Bank,
```

Sort Report

```
##### OMEGA SORT UTILITY #####
Field Asc/Desc Alph/Num Line Word Chars
1 ASCENDING ALPHABETIC

Sorting record number: 6
Saving on disk record number: 6
Copying back to original. Please do not interrupt.
```

Special sort instructions

If you want to sort a list in an order other than numerical or alphabetical ascending, you can do so by typing special instructions in the sort document. In this way, you can instruct OMEGA to arrange the records according to certain digits, or characters, or in descending rather than ascending order. Some special sort instructions are explained below.

- You can instruct OMEGA to sort by a particular line or word within a field, rather than the first line or word of the field. For example: FIELD (2) LINE (3) or FIELD (5) WORD (2).
- The word LAST instructs OMEGA to sort by the last word in a field. For example: FIELD (3) LAST.
- You can sort by a particular character in a line or in a field, such as FIELD (1) LINE (3) WORD (2) CHARACTER (4).
- OMEGA can sort by a particular digit in a field. For example, LINE (2) DIGIT (3).
- The word ALPHABETIC instructs OMEGA to sort by alpha characters. If no instruction is given, the sort will be alphabetic then numeric.
- The word NUMERIC instructs OMEGA to sort by the numbers (0-9) at the beginning of a field. "NUMERIC" stops reading a field at the first non-numeric character and moves to the next record.
- The word DESCENDING instructs OMEGA to sort in descending order (Z through A, 9 through 0).
- The word ASCENDING instructs OMEGA to sort in ascending order A-Z, 0-9. If no instruction is given, the sort will be in ascending order.

NOTE: You can perform other sorts as well as multiple sorts by using advanced sort instructions. These are explained in Chapter 42 of your Reference Manual.

Sort Instructions

FIELD (--)
LINE (--)
WORD (--)
LAST
CHARACTER (1) or CHARACTERS (--)
DIGIT (1) or DIGITS (--)
NUMERIC
DESCENDING
ALPHABETIC
ASCENDING

Summary

In this system guide you learned about the many options OMEGA offers for using a records list.

Options for using a records list

1. You can print it, producing a listing of the information contained in each record.
2. You can merge the list with a "letter," which is a standard document such as a form letter, report, envelope, or label. Merges can be performed on the printer, on the screen, or automatically.
3. You can select certain records from the list to merge with a letter. By creating a selection document, you can tell the system what characteristics to look for in each record.
4. Finally, you can sort the records list, rearranging the records for different purposes. Before you sort, you create a sort document, which tells the system what records list to sort and what fields or parts of fields to use in sorting the list.

Now complete the review questions on the next page.

Section 7 Review Questions

1. List the two components needed to perform a sort.

2. Practice writing sort documents.

Check the answers on Page 48 of this system guide.

You have now completed System Guide 11. To begin the next module, locate System Guide 12.

Answers to Review Questions

Section 1

1. Answers will vary.
2. A. record, B. records list, C. field
3. 5 1. Type the information for each record on the list.
6 2. Add and delete records as necessary.
2 3. Organize record information into fields.
4 4. Make a mask.
1 5. Decide the amount and type of information to save in each record.
3 6. Make a sketch.

Section 2

1. A draft list is printed without regard for formatting. It has no page breaks and may print over the perforations in continuous form paper.
2. Answers will vary.
3. Answers will vary.

Section 5

1. A. merge automatic, B. merge at the printer, C. merge on the screen
2. merge automatic
3. A. frame, B. records list, C. pattern

Section 6

1. records list, "letter," selection document
2. keywords, criteria

Section 7

1. records list, sort document

Answers to Disk Instruction

Section 2 - Sample Sketch

<u>Field #</u>	<u>Description</u>
1	policy holder's name
2	street address
3	city
4	state
5	zip code
6	salutation
7	type of insurance

